

Create a Marketing Plan for Your Practice

Proper preparation before a **Marketing Plan** is implemented is vitally important to the success of your Plan. Many dental teams decide to try some marketing activities, but without forethought and advance planning the efforts are often short-lived, ineffective, and inordinately expensive.

Begin with a **Situation Analysis**, a candid review of strengths, weaknesses, and needs in your practice. Work to understand the perceptions and expectations your patients have of your services by surveying patients to seek their input. Understand the reputation your practice has in your community. Survey your staff members, asking their opinions: (1) what's great in the office and needs to be continued; (2) what's a problem and needs to be changed or stopped; and (3) what's missing and should be added? Evaluate previous marketing activities---successful? Effective? ineffective? cost?

The dentist must envision what he/she wants the practice to become. Articulate what the practice will look like in three years? In five years? This Vision Statement becomes the goal posts for the marketing efforts.

Next, team-author a Mission Statement which should express the scope of values under which the practice operates. What is important to the dentist and team members besides the core concern of providing quality care for patients? The old adage, "Remember—there is a person attached to the end of that tooth you're treating!", fits here as a reminder that the most successful dental practices are about way more than treating teeth.

2% to 5% of collections can cost effectively be spent on marketing activities. This figure should include internal marketing efforts directed at current patients, external marketing efforts to attract new patients, and, if employed, the compensation for a Marketing Coordinator. If a current team member devotes a portion of her/his work week to marketing activities, count wages for the time spent on marketing as a marketing cost, subtracting that amount from regular wage costs. Other marketing costs vary widely and might include such activities as website development and maintenance, social media postings, a part-time IT person, etc. along with the use of other types of media such as Yellow Page advertisements, local newspaper or magazine ads, and so on; direct mail pieces; sponsorships of local sports teams, charitable organizations, and social or business functions in your community; the supply of toothbrushes (imprinted with your practice name, of course) and other oral hygiene supplies for schools, homeless shelters, disaster relief efforts; gifts or meals to thank referral sources, etc.

The most effective marketing plans involve the entire staff with one team member acting as coordinator. Plans for the next year, including a budget, may be made in the fall for the next year. Specific activities with dates for implementation should be assigned to individual team members. Activities and results should be monitored and reported at monthly staff meetings by the individuals involved.

In summary, **Steps to a Marketing Plan** include:

- Make an honest **Situation Analysis** to assess the current position of the practice. How visible is your office community-wide? How many dental practices are in your community? What is the reputation of your practice? How does that compare with other offices in the area? How close are you to meeting the number of the new patients-per-month goal? Do you set and monitor production, collection, expense, and profit goals? Have you made changes in the scope of treatment you offer to patients? Do they know about additional services? Are there any current marketing activities? Are they successful? Is your practice unique in any aspect?
- The dentist should envision all aspects of the practice in three years; in five years and share his/her vision with the team. This exercise produces the **Vision Statement**.

- Team members must understand and support the Vision and enroll in the process of bringing the Vision to reality by helping to write the **Mission Statement** for the practice. The **Mission Statement** should include factors such as: what you value together as a team; what you are about in addition to providing dental care; and how will you reach your vision of success.
- Select a Marketing Coordinator from among current staff or hire a new team member to fill the role.
- Establish a budget; typically, 2% to 5% of collections can be spent on marketing activities.
- Set specific goals that will mark success:
 - Average production per month to meet the break-even point plus desired profit.
 - Average collection per month—minimum 97% of production
 - Recare system—minimum 70% to 80% of active patients enrolled
 - Treatment acceptance—minimum 80% to 90% acceptance
 - Show rate for appointed patients—minimum 90% or more in general and most specialty offices; 80% to 90% in pediatric dentistry.
 - Average new patients per month—recommended:
 - General practice, 20 to 30/month
 - Pediatric dental practice, 50 to 75 or more/month
 - Orthodontics, 40 or more/month
 - 100% reduction in patient complaints
- Complete a calendar of marketing activities including: (1) what is to be done, (2) date for implementation, (3) who is responsible, (4) projected costs, and (5) ways to evaluate effectiveness.
- Measure progress toward stated goals and celebrate success.